



Lexington Public Schools

146 Maple Street ♦ Lexington, Massachusetts 02420

Ian L. Dailey
Assistant Superintendent for Finance and Operations

Tel: (781) 861-2580
Fax: (781) 861-2560
idailey@sch.ci.lexington.ma.us

Financial Assistance Program Overview for 2016-2017 School Year

In 2008, School Committee authorized a centralized application process to provide families with financial assistance for certain school related fees. The program provides a prorated subsidy for households earning less than 350% of the US Department of Health and Human Services poverty guidelines. The United States Department of Agriculture uses these guidelines to determine the Free and Reduced Lunch eligible income levels. The tables of income levels provided in this document are based on the United States Health and Human Services Poverty Guidelines posted at their website (<http://aspe.hhs.gov/poverty/index.shtm>).

The School Committee's determination for income eligibility for financial assistance is as follows:¹

Determination Status	Income Level over Poverty Guideline for Household Income	Households will pay
Approved for Free	<200%	\$0 program fee
Active Military Personnel	Up to \$25 Per Sport/Field Trip	Up to \$25 Per Sport/Field Trip
75% Reduction of Fee	201% - 300%	25% of the program fee
50% Reduction of Fee	301% - 350%	50% of the program fee

* % above HHS Poverty Guidelines (<http://aspe.hhs.gov/poverty/index.shtm>).

The income distribution is based on the statistics of the number of households who are on the margin of economic stability and recognition of the high housing costs and property tax in Lexington. A table is provided for the income levels that apply in each category for each household size.

2016 HHS Poverty Guidelines							
Persons in Family or Household	48 Contiguous States and D.C.	Free Lunch (130%)	Reduced Lunch (185%)	Lexington District Fee Waiver	Free Family Waiver (200%)	Reduced Fee to 25% of Fee (300%)	Reduced Fee to 50% of Fee (350%)
1	\$ 11,880	\$ 15,444	\$ 21,978		\$ 23,760	\$ 35,640	\$ 41,580
2	\$ 16,020	\$ 20,826	\$ 29,637		\$ 32,040	\$ 48,060	\$ 56,070
3	\$ 20,160	\$ 26,208	\$ 37,296		\$ 40,320	\$ 60,480	\$ 70,560
4	\$ 24,300	\$ 31,590	\$ 44,955		\$ 48,600	\$ 72,900	\$ 85,050
5	\$ 28,440	\$ 36,972	\$ 52,614		\$ 56,880	\$ 85,320	\$ 99,540
6	\$ 32,580	\$ 42,354	\$ 60,273		\$ 65,160	\$ 97,740	\$ 114,030
7	\$ 36,730	\$ 47,749	\$ 67,951		\$ 73,460	\$ 110,190	\$ 128,555
8	\$ 40,890	\$ 53,157	\$ 75,647		\$ 81,780	\$ 122,670	\$ 143,115
For each additional person, add	\$ 4,160	\$ 5,408	\$ 7,696		\$ 8,320	\$ 12,480	\$ 14,560

SOURCE: Federal Register, Document Citation: 81 FR 4036, Monday, January 25, 2016 / Document Number: 2016-01450

¹ The School Committee Financial Assistance program uses the US Department of Health and Human Services poverty guidelines and expands it by a multiplier to better match our community's income level and assist families that are above the Free and Reduced Lunch Guidelines with school fees that are assessed for a variety of activities.

Process for Applying

Financial Assistance Applications are available for each school year after May 1. The application is available online and copies are available from the Transportation Office or the Business Office. Families should continue to register according to posted program deadlines to ensure that should the application not be granted, the lowest fee is still available.

Applications are processed by the Business Office throughout the school year as they are submitted. Due to the volume of applications at registration periods and the information required, it can take up to four weeks or more to have an application processed from start to final notification of parents and the program for which they are seeking the waiver. Every effort is made to process these applications as quickly as possible.

Steps:

- 1) Complete the application and provide copies of documentation requested. **Income and financial support must be documented** (copies can be made for you at the Business Office);
- 2) Submit completed form to the Business Office;
- 3) Determination is made by the Business Office;
- 4) The Business Office completes notification by letter to the family, school principal, and programs.

Due to the nature of the applications process, we do not take into account mortgage payments, property value (unless zero income is reported), college tuitions, or household expenses.

Determination of Income

The Lexington Public Schools Financial Assistance Program determines income based on the income of ALL household residents. Anyone living in your household is required to submit income documentation including domestic partners, relatives, and any other individuals residing at the address. The district has a single application procedure applied for all **school** fees for the full school year with only school lunch being the exception. No employee, coach, or staff member has the authority to waive any fees or charges without the income determination letter provided by the Business Office.

Required documentation of household income includes but is not limited to the following:

- 1) **The Lexington Public Schools requires financial assistance applicants to submit a copy of the IRS Federal Tax Return transcript.** The school district will no longer be accepting copies of form 1040, 1040A, or 1040EZ. Parents must obtain a **FREE** official Tax Return Transcript of their Federal Tax Return from the IRS for each of the wage earner, not filing jointly, residing the household. See instructions under "Verification of Income" below.
 - a. **2015 Internal Revenue Service TRANSCRIPT, call 800-908-9946 or visit: <https://sa1.www4.irs.gov/irfof-tra/start.do> of all adults residing in the household;**
- 2) Supplemental Security Income (SSI) and Disability Income;
- 3) Unemployment Compensation and Severance Pay;
- 4) Alimony and Child Support Agreements;
- 5) Transitional Assistance Letters and Benefits;
- 6) Lexington Housing Authority Income Determination Letter;
- 7) Section 8 Housing Voucher
- 8) Foster Children are handled as one household and are not included as a member of the family in which they are residing or in the household income of the custodial parent;
- 9) Non-Custodial Parent income is considered when one parent receives the tax deduction for the dependent and there is no record of child support.
- 10) Valid Employment Contract if not paying taxes

If these documents cannot be provided, the Business Office will not be able to process your application and financial assistance will not be made available.

Verification of Income

The program will ask for and require documentation of income from parties who do not reside with the household that are providing financial support. Particularly if there is no documentation regarding the status of child support or death certificate or district knowledge of deceased parents. Guardianship and Foster Child status must also be provided if not already a matter of student record. Failure to provide documentation at the time of the application will delay the determination process. Your child will not be allowed to participate in any program until the documentation has been received by the Business Office.

Tax Return Transcript Instructions:

Option #1: Online Request

- Go to the IRS Web site at www.irs.gov.
- In the "Tools" section of the home page click "Order a Tax Return or Account Transcript".
- Click "Order a Transcript".
- Enter the tax filer's Social Security Number, date of birth, street address, and zip or postal code. Use the address currently on file with the IRS. Generally this will be the address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click "Continue".
- In the Type of Transcript field, select "Return Transcript" and in the Tax Year field, select "2015". The "Return Transcript" is the IRS document that should be requested. Do not select "Account Transcript" as this is not a copy of the entire tax return.
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS.
- IRS Tax Return Transcripts requested online cannot be sent directly to a third party by the IRS.

Option #2: Telephone Request

- Available from the IRS by calling 1-800-908-9946.
- Tax filers must follow the prompts to enter their social security number and the numbers in their street address. Generally this will be numbers of the street address that was listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Select "Option 2" to request an IRS Tax Return Transcript and then enter "2015".
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address that was used in their telephone request, within 5 to 10 days from the time the IRS receives the request.
- IRS Tax Return Transcripts requested by telephone cannot be sent directly to a third party by the IRS.

Option #3: Paper Request Form – IRS Form 4506T-EZ

- IRS Form 4506T-EZ should be used instead of IRS Form 4506-T because it is sufficient to request an IRS Tax Return Transcript.
- Download at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on Line 4. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly a third party by the IRS.
- On line 6, enter "2015" to receive IRS tax information for the 2015 tax year that is required for the 2015-2016 Financial Assistance Application.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the appropriate address (or FAX number) provided on page 2 of Form 4506T-EZ.

- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. NOTE: Processing Form 4506T-EZ means verifying/validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.

Helpful Links:

Tax Return Transcripts: <https://sa.www4.irs.gov/irfof-tra/start.do;jsessionid=0s2wNMg2OIFpASSz-0kwPSx6>
 Order a Transcript: <http://www.irs.gov/Individuals/Order-a-Transcript>

Background of the Program

The School Department undertook centralizing financial assistance applications for families seeking relief from various program fees. The program goals were as follows:

- 1) Implement an objective financial assistance program for all students and families;
- 2) Allow families a single point of contact and determination within the school district;
- 3) Adhere to a standard of confidentiality throughout the district;
- 4) Remove the Principal's Office and Guidance staff from making determinations of financial need using Free and Reduced Lunch applications, which violates the USDA School Lunch program.

Financial Assistance is offered system wide and includes Transportation, Athletics, and all other program and field trip fees. Other program fees include curriculum-based field trip expenses, Lexington Children's Place tuition, and other fees the school department may charge that are as a result of curriculum requirements.

The Financial Assistance Program does *not* include optional field trips or student travel programs, including overnight trips. There is typically no funding source for scholarship for these programs due to the nature of each participant paying their own way. The program leaders for these optional student trips may know of a funding source that will be providing scholarship. However, if there is no funding source for scholarship, the student is responsible for the full cost of the trip. The school department is not responsible for finding the scholarship funds for the student if there are none readily available.

Other Financial Assistance available in Massachusetts

Department of Transitional Assistance: Supplemental Nutrition Assistance Program or SNAP is the name for the Food Stamp Program. If you live in Massachusetts, you can apply for SNAP/Food Stamps online. <http://www.mass.gov/snap>. To get more information about SNAP/food stamp benefits and an application, call the Department of Transitional Assistance SNAP Benefits Hotline at 1-866-950-FOOD (3663). SNAP benefits are available for qualified Massachusetts residents.

USDA Free and Reduced Lunch Program: In August, Free and Reduced Lunch Applications will be mailed to all registered student households. In order to receive Free or Reduced Lunch meals, a Free and Reduced Lunch Application must be completed and returned to the Business Office. Parents should familiarize themselves with the School Committee [Meal Charge Policy](#).²

Important Information about Free and Reduced Lunch Status:

- 1) Students are required to use PIN numbers that are assigned by the Food Service Program to make payment for meals.
- 2) The published meal price is charged based on the status of the student on the date the meal is purchased. Please be aware that families who may qualify will have to pay full price until their application is approved. The effective date of the approved application establishes the status of the student. There is no retroactive credit applied to the account to remove any balance due unless it is directly tied to the approval date of the application. Please work with our Food Service staff if you would like more information about being able to put funds on account for your child. (781-861-2320 x69107)

¹ <http://lps.lexingtonma.org/cms/lib2/MA01001631/Centricity/Domain/365/MealCharge%20Policy02NOV10.pdf>

- 3) Free lunch status students will not be allowed to have a negative account balance. Free lunch status allows a child to receive a free meal everyday. A la Carte items are not part of the USDA program. Cash or a Credit Balance with Food Service must be used to pay for A la Carte items.
- 4) Reduced lunch status students will be allowed to have a negative account balance up to a maximum dollar equivalent of six (6) reduced priced meals, which will be known as the "account cap." Reduced lunch status allows a child to receive reduced priced meals at \$0.40. Cash or a Credit Balance with Food Service must be used to pay for A la Carte items. Please work with our Food Service staff if you would like more information about being able to put funds on account for your child. (781-861-2320 x69107)
- 5) Bag Lunches can be made available for students who are attending field trips when requested. Sometimes, teachers make arrangements for bag lunches for the entire classroom. At other times, the parent will need to contact Food Service to make arrangements two weeks ahead of time (781-861-2320 x69107). The field trip information packet from the school should indicate if lunches are being provided or not.

Other Financial Assistance available in Lexington

Lexington Senior Center & Human Services Department
1475 Massachusetts Avenue
Lexington, MA 02420
Telephone: (781) 861-0194
Fax: (781) 863-2271

<http://www.lexingtonma.gov/youth-and-family-services>

- 1) The Lexington Department of Human Services provides central access to information and referral, clinical and financial assessments, connection to resources and consultation services to all Lexington residents. Programs are tailored to meet the needs of youth, families, adults and seniors.
- 2) **Town Of Lexington Community Resource Guide:** Listing of various health and human service programs available in Lexington and surrounding area. The Social Services Department (781-861-0194) may also have knowledge of other financial assistance programs available to families for food, housing, and other assistance programs available through state agencies. The Town of Lexington Human Services Community Resource Guide is available at <http://www.lexingtonma.gov/sites/lexingtonma/files/uploads/resourceguide.pdf>. Paper copies are also available at Cary Memorial Library, the Human Services Department and the Lexington Senior Center.
- 3) **Lexington Human Services Fund:** The Lexington Human Services Fund was established to provide one-time emergency financial assistance to Lexington residents. Applications are available through the Human Services Department.